

Locations and Assets Training Manual

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1 Locations & Assets

1.1 Objectives

- Describe location and asset records
- Understand how IA-FMS (Maximo) organizes locations and assets
- Know how to find and manage location and asset records
- Have the ability to create location and asset records
- Understand location and asset statuses
- Perform asset moves
- Decommission locations

1.2 Understanding Locations and Assets

There are two basic building blocks of the IA-FMS (Maximo) system: location records and asset records. These records must be created any time a site (School, Agency, Justice Center) acquires new assets, components, and equipment.

In IA-FMS (Maximo), locations and assets can be organized geographically, rather than by function. This type of hierarchy allows information to be entered quickly, efficiently, and accurately. The geographical (location) hierarchy used in the IA-FMS (Maximo) system

- 1) Acknowledges real property in *real* locations;
- 2) Aligns with FBMS Business Entities, Real Estate and Building Records; and
- 3) Is well-suited for the long-term, as it is less likely that locations will change with reorganization.

Any Maximo location record (i.e. building, tower, and tank) that is FBMS relevant displays an FBMS ID. This indicates that it is aligned with FBMS, and therefore has a corresponding record in FBMS.

Find: [] Select Action []

List Location Building Detail Assets History Safety Meters FBMS Data

Maximo ID: AB101072 * Law Enforcement, Detention Center, Adult

Structure #: I-1

Room #: []

Use *: BUILDING \ LAWENFOR \ DETCNT \ ADULT >>

FBMS ID: IB14001000373320000000

FRPP #: BDC52R0100I-1

* Location Type: 1100

Maintained By: BIA Non-Education

* Owned By: BIA

Tribal Reference ID: []

FBMS Relevant? ☒

OSG (Y/N)? ☐

Remote Location? ☐

Attachments

Site: JS004 CROW AGENCY (Crow Law Enforcement Center)

Location #: C52-02

API: 100

Mission Dependency: 1

DM Cost: 213,806.00

CRV: 1,590,184.02

FCI: 0.13

FCI Based Condition: Poor

* Type: OPERATING

Status: OPERATING

FBMS Status: NONE

Funds/Cost Center: AACC526130

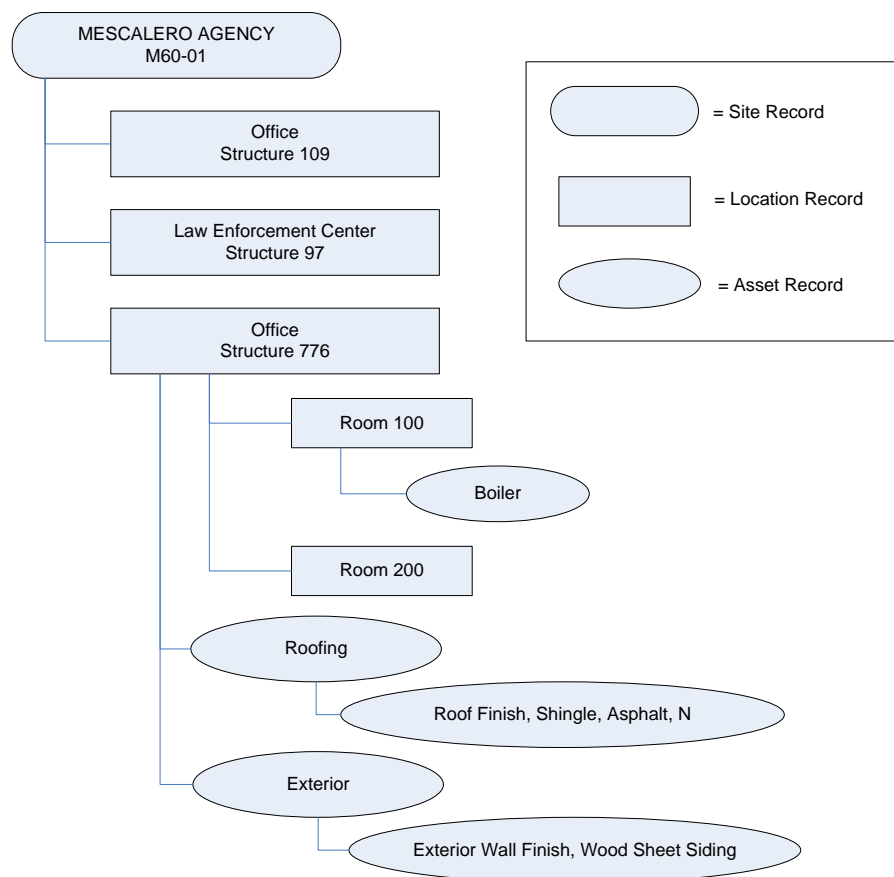
Last CA Inspection Number: []

Last CA Inspection Date: []

Remember, locations and assets in IA-FMS (Maximo) are arranged hierarchically, or as in a parent/child relationships. For example, a building location may physically have many different rooms. The building itself would be a location with one or more child records to represent each of the rooms. Thus, a two level location hierarchy would be constructed in IA-FMS (building, then room) to represent the physical layout of the building.

While IA-FMS provides users with the functionality to create Work Order Hierarchies, the concept of navigating and organizing data in IA-FMS hierarchies is best represented in the **IA Locations and IA Assets** applications, as shown in the figure below.

NOTE: It is of vital importance that users review the IA Location hierarchies to ensure locations are in the correct Site. It is also important to periodically check the information contained on the FBMS tab to ensure location information within FBMS is being maintained properly. If discrepancies are discovered, please contact your Regional Facility Manager and Real Property Manager who will assist with completing and submitting the FBMS Asset Update Form. This form will be made available in IA-FMS. All location data updates have to be made in FBMS and FBMS will update IA-FMS through the interface (IF505).



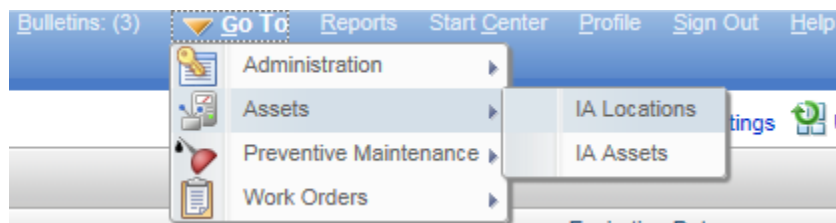
1.3 Creating a Location Record

Location records that represent the buildings (or towers and tanks) are directly aligned with a record in FBMS. As FBMS is the system of record for real property, the "linked" Maximo location records cannot be edited from within IA-FMS (Maximo). The FBMS system owns these records and passes updated information about the records to IA-FMS (Maximo) via the DOI FBMS-Maximo system interface.

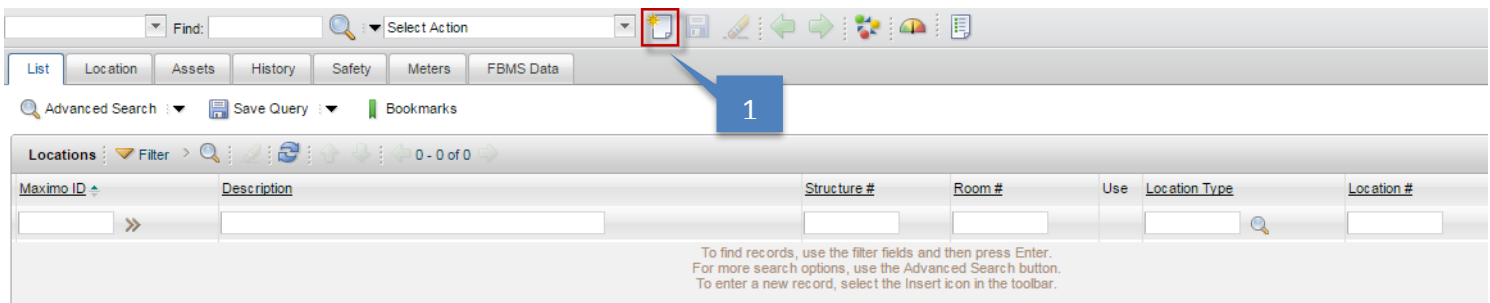
There are exceptions where users can create locations within IA-FMS (Maximo). These are:

- Creation of a planned location. This record is a placeholder and will be updated with information from FBMS when the corresponding Real Estate and Building Record are created.
- Creation of child locations. These records are used to represent sub-locations or physical spaces within a building or structure (e.g. rooms).

To create a location, navigate to the **IA Locations** application, located in the **Assets** module.



The landing page for the IA Locations applications is the **List** tab as shown in the next figure.



- 1) Click on the **New Location** icon located on the toolbar. The location tab will open with a new location record.

The screenshot shows the 'IA Locations' form with the following fields and callouts:

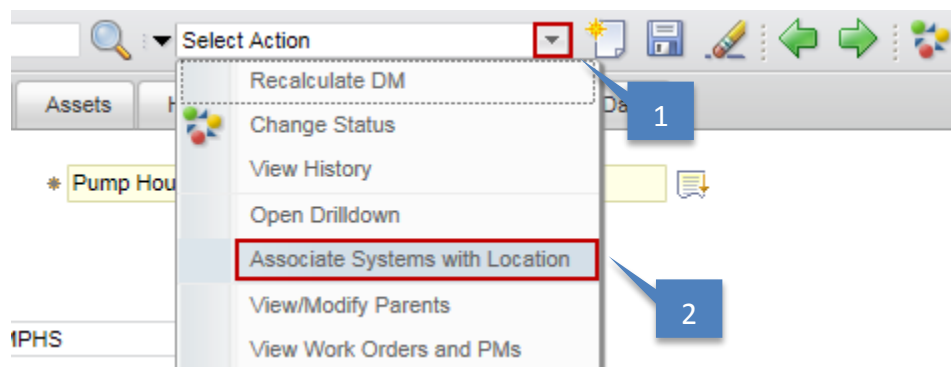
- 1**: Maximo ID: AB261045
- 2**: Site: IE150, ST. STEPHENS INDIAN SCHOOL
- 3**: Room #: (empty)
- 4**: Use *: (empty)
- 5**: Location Type: (empty)
- 6**: Owned By: (empty)
- 7**: Select Action menu (top right)

Other fields visible include: FBMS ID, FRPP #, Maintained By: Grant Education, Tribal Reference ID, OSG (Y/N)?, Remote Location?, Attachments, Location #, API, Mission Dependency, DM Cost, CRV, FCI, FCI Based Condition, Type: OPERATING, Status: NOT READY, FBMS Status: NONE, Funds/Cost Center, Last CA Inspection Number, Last CA Inspection Date.

- 1) Maximo ID' will auto populate
- 2) Enter 'Maximo ID' (Location) Description.
- 3) Enter 'Room #' (if applicable).
- 4) Enter 'Use' code.
- 5) Enter 'Location Type'.
- 6) Enter 'Owned By'.
- 7) 'Save' the record.

When creating a location record, a parent location must be identified. This requires using the **Select Action** menu.

- 1) Click on **Select Action** menu.
- 2) Select **Associate Systems with Location**.



- 3) Choose **Associate Systems with Location**. A pop-up window will appear.

Associate Systems with Location

? To associate a new system with the current location, click New Row.

* Location: AB261081 Office

Site: IE121

System	Description	Primary System?	Network?	Parent
There are no rows to display.				

New Row

OK Cancel

4) Select **New Row**

Associate Systems with Location

? To associate a new system with the current location, click New Row.

* Location: AB261081 Office

Site: IE121

System	Description	Primary System?	Network?	Parent
PRIMARY	IE121 PRIMARY SYSTEM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AB174889

Details

* System: PRIMARY IE121 PRIMARY SYSTEM

Parent: AB174889 Shop

Primary System? ☒

Network? ☐

New Row

OK Cancel

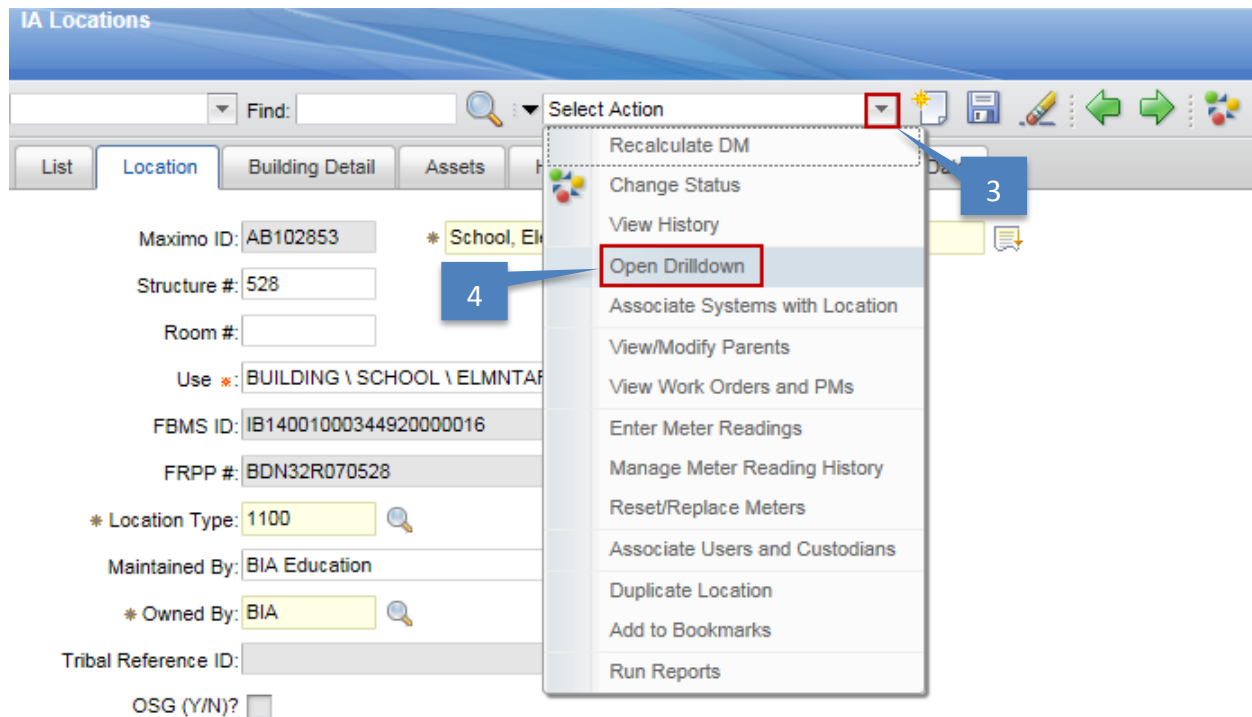
- 5) Select 'Primary' in the **System** field.
- 6) Fill out the **Parent** field (this is the Maximo ID).
- 7) Select **OK**.

The location record has additional information within a series of tabs. The location type controls which tabs a user sees. Complete the additional information where appropriate to ensure you have the most complete and accurate information for each record in the system.

1.4 Viewing Location Hierarchies

To view the Location Hierarchy for any Site within IA-FMS (Maximo):

- 1) Navigate to the **IA Locations Application**.
- 2) Select a specific Location.



- 3) Click on the **Select Action** menu.
- 4) Select **Open Drilldown**.

Drilldown

? Select to show children. Select to hide children. Select to return location / asset.

Locations Assets

Location: AB102853 School, Elementary, Day Status: OPERATING Site: IE121

Asset in Location: Multiple top-level assets at this location.

System PRIMARY

5 AB102853: School, Elementary, Day

Show All Systems
Show Path to Top
View Work Details

Cancel

5) Click on the icon to expand the drilldown for the selected location to display child Locations

Drilldown

? Select to show children. Select to hide children. Select to return location / asset.

Locations Assets

Location: AB102853 School, Elementary, Day Status: OPERATING Site: IE121

Asset in Location: Multiple top-level assets at this location.

System PRIMARY

6




Show All Systems
Show Path to Top
View Work Details

- AB102853: School, Elementary, Day
 - AB174876: Office
 - AB174877: Restroom
 - AB174878: Office
 - AB174880: Storage
 - AB174881: Classroom, General
 - AB174882: Storage
 - AB174897: Office

Cancel

6) Click on the **Assets** tab to view Assets that are associated to highlight Location.

Drilldown

? Select  to show children. Select  to hide children. Select  to return location / asset.

Locations

Assets

Asset: AB102909

Generator, Emergency, Automatic Transfer

Asset Up? ☒

Site: IE121

Location: AB102853


School, Elementary, Day


Rotating Item:


Failure Class:


Show Path to Top


View Work Details


 AB102909:Generator, Emergency, Automatic Transfer


 AB106682:Clay Brick


 AB190480:Fan, Exhaust Hood

 AB197178:Fan, Roof-Mounted Exhaust

 AB197179:Fan, Roof-Mounted Exhaust

 AB197180:Fan, Roof-Mounted Exhaust

 AB197181:Fan, Roof-Mounted Exhaust

 AB197182:Fan, Roof-Mounted Exhaust

^

v

Cancel

1.5 Creating Asset Records

Unlike locations, asset records are currently not linked or tied to the FBMS system. Users within IA-FMS (Maximo) have full control to create and manage all aspects of asset records.

Asset records are organized in IA-FMS (Maximo) within a hierarchy of their own that is linked to the geographic hierarchy of location records. Consider the example below. *Lobby* is the location record to the *Boiler, Hot Water* asset record, which is in turn the parent to the *Heater, Radiator* child asset record.

Drilldown

Select to show children. Select to hide children. Select to return location / asset.

Locations Assets

Asset: AB203174 Boiler, Hot Water Asset Up? ☒ Site: IE033

Location: AB174354 Lobby Rotating Item:

Failure Class:

Show Path to Top View Work Details

- AB132790:Uncarpeted
- AB188859:Fan, Exhaust without Light
- AB203171:Fuel Distribution System (by Connection Count)
- AB203174:Boiler, Hot Water
- AB213095:Heater, Radiator
- AB224220:Water Heater
- AB224221:Water Heater
- AB224222:Water Heater

Cancel

The drilldown window is a menu choice (from the **Select Action** menu) in location or assets records. It provides another view of the parent and child asset records on the **Asset** tab and their relation to the location hierarchy on the Location tab.

Note: Placeholder / Parent asset records are used to show the relationship among various components or equipment. As child assets can often times have identical names, having them grouped within the hierarchy can help users understand where each record falls.

Navigate to the **IA Assets** application within the Assets Module.

The screenshot shows the IA Assets application interface. At the top, there is a navigation bar with 'Bullets: (3)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a toolbar with various icons. A blue box with the number '1' points to the 'New Asset' icon (a document with a plus sign). Below the toolbar, there are tabs for 'List', 'Asset', 'Spare Parts', 'Safety', and 'Meters'. The 'Asset' tab is selected. In the main area, there are several input fields: 'Asset: AB342338', 'Status: NOT READY', 'Location Type: 1100', 'Use: ' (with a search icon), 'Site: IE121', 'RED ROCK DAY SCHOOL', 'Location #: N32-07', and 'Type: FACILITIES'. A blue box with the number '2' points to the 'Description' field, which contains the text '* Generator, Emergency'. A blue box with the number '3' points to the 'Maximo ID' field, which contains the text '* Maximo ID: AB102850'. A blue box with the number '4' points to the 'Type' field, which contains the text 'FACILITIES'. A blue box with the number '5' points to the 'Save' icon (a floppy disk) in the toolbar. Below the main area, there is a 'Details' section with various fields: 'Parent: ' (with a search icon), 'Priority: ', 'Serial #: ', 'Last Inspection Type: ', 'Last Inspection Number: ', 'Last Inspection Date: ', 'Maintain Hierarchy? ' (checkbox), 'Structure #: 506', 'Room #: ', 'Meter Group: ' (with a search icon), and 'Museum Property? ' (checkbox). A blue box with the number '3' points to the 'Structure #' field, which contains the text '506'.

- 1) Click on the **New Asset** icon, located in the tool bar.
- 2) Enter an asset **Description**.
- 3) Select the **Maximo ID** (location / structure) for the asset.
- 4) Select the asset **Type**.
- 5) Click the **Save** icon.

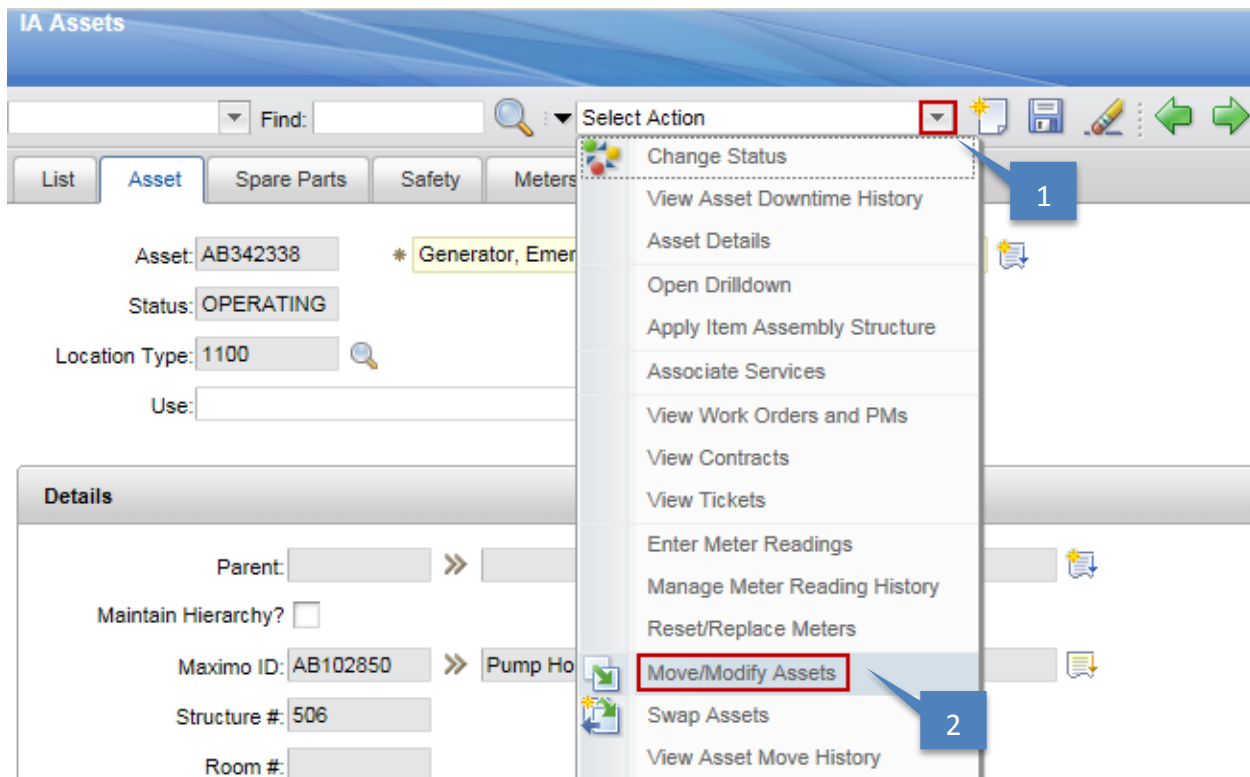
Note: When assets are created they have a default status of NOT READY. In this status, work orders cannot be posted against the asset. In order to begin posting work orders against the asset, change the status to OPERATING.

1.6 Creating Child Asset Records

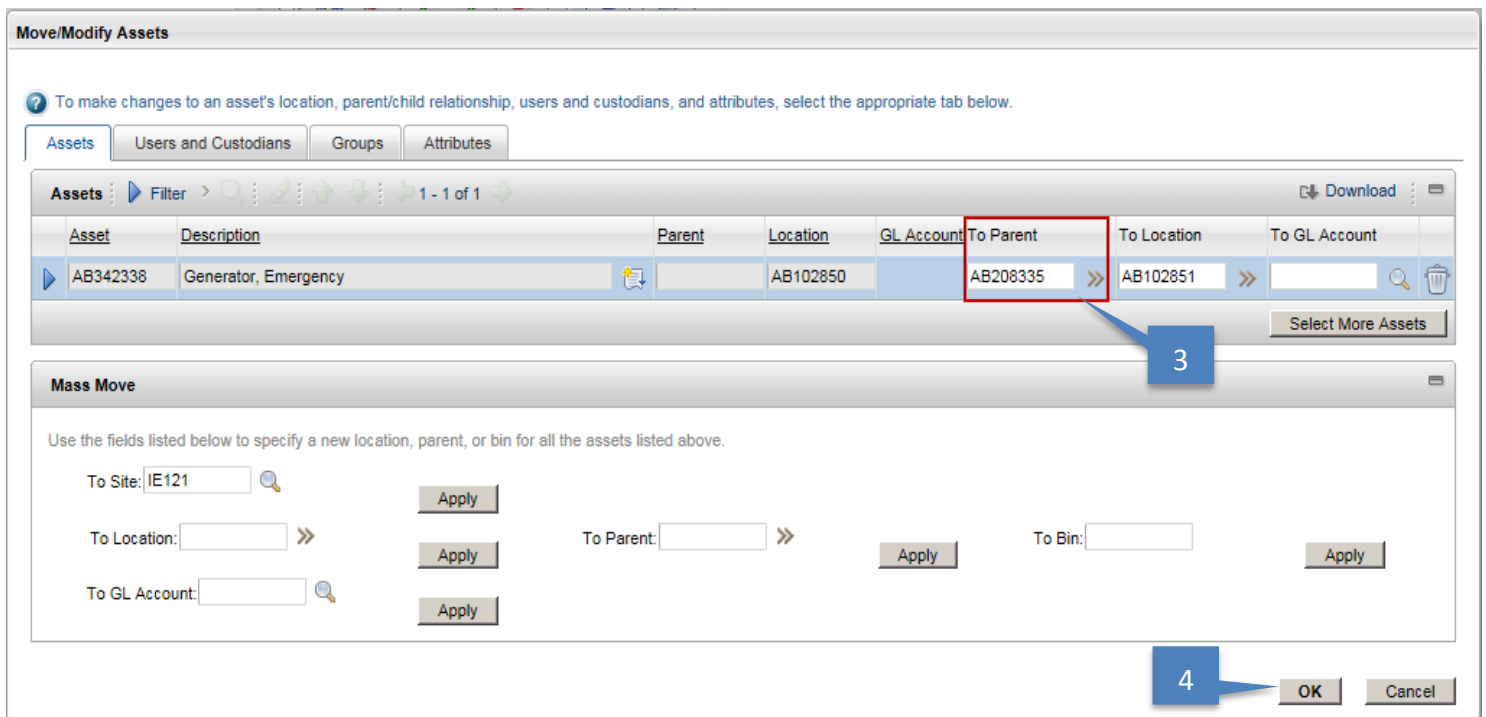
The process for adding a child asset record is the same as the Parent record, however when creating the Child Asset Record you must specify the Parent Asset.

The screenshot shows the 'IA Assets' application interface. At the top, there is a blue header bar with the text 'IA Assets'. Below this is a toolbar with a 'Find' search bar, a 'Select Action' dropdown, and several icons. Below the toolbar is a tabbed interface with tabs for 'List', 'Asset', 'Spare Parts', 'Safety', and 'Meters'. The 'Asset' tab is currently selected. In the main area, there are several input fields: 'Asset: AB342338', 'Status: OPERATING', 'Location Type: 1100', and 'Use:'. To the right of the 'Asset' field is a yellow dropdown menu showing '* Generator, Emergency'. Below these fields is a 'Details' section. In the 'Details' section, there is a 'Parent:' field with a red box around it and a double arrow icon. Below this is a 'Maintain Hierarchy?' checkbox. At the bottom, there is a 'Maximo ID: AB102850' field with a double arrow icon and a dropdown menu showing 'Pump House'.

Note: Child asset records may represent multiple duplicate components. However, you must ensure that all the attributes are identical for all components. For example, if you have 10 windows in the same building that are the exact same size, material, etc., but five of them were installed in 1955 and the other five were installed in 1970, you will need to create two different asset records with quantities of five.



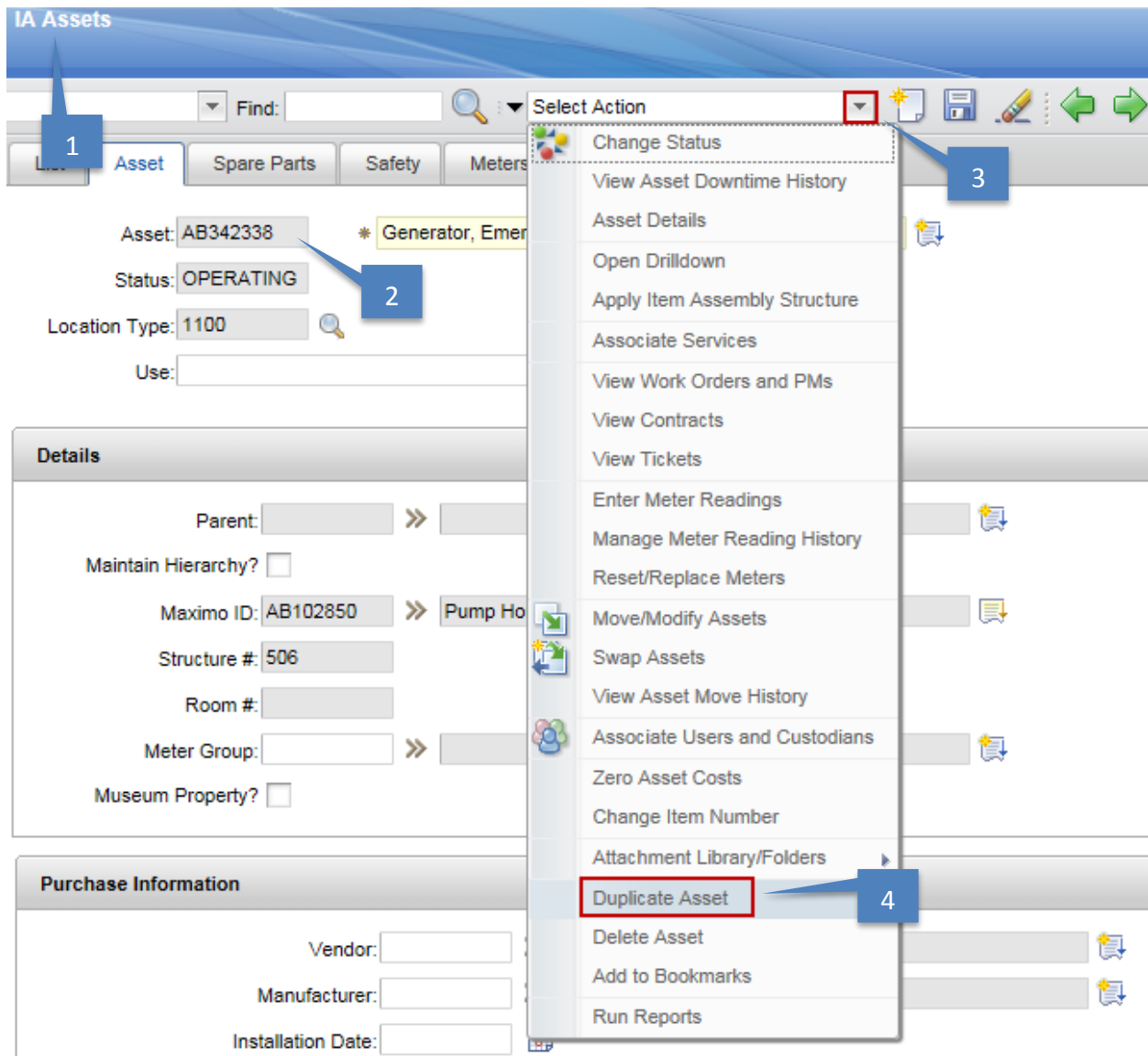
- 1) To associate a Parent asset click on the **Select Action**.
- 2) Select **Move/Modify Assets**.



- 3) Select **To Parent**.
- 4) Click **OK**.

1.7 Duplicating a Location or Asset Record

- 1) Navigate to the appropriate application (IA Assets or IA Locations).
- 2) Search for and open the record you wish to duplicate.



- 3) Once in the record, click on the **Select Action** menu located in the toolbar.
- 4) Select **Duplicate Asset** (in the IA Asset app.) or **Duplicate Location** (in the IA Locations app).

IA Assets

Find: Select Action

List Asset Spare Parts Safety Meters

Asset: AB342339 * Generator, Emergency

Status: OPERATING

Location Type: 1100

Use: >>

Details

Parent: >>

Maintain Hierarchy? ☐

* Maximo ID: AB102851 >> Shop, Maintenance

Structure #: 526

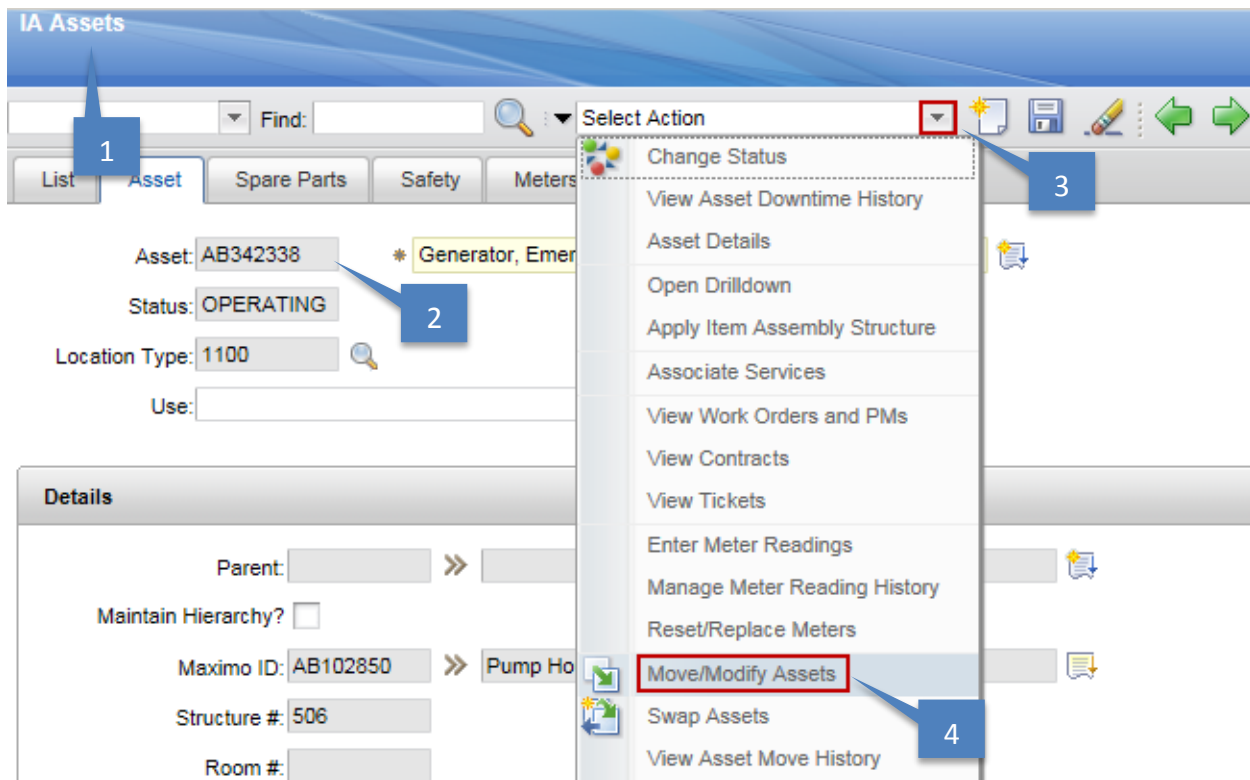
Room #:

Meter Group: >>

Museum Property? ☐

- 5) A new record will appear. The new record will have the same status as the duplicated record. As with new records, the duplicated record will be auto-numbered. You will have to provide a **Maximo ID** (Location) for the duplicated record.
- 6) **Save** the record.

1.8 Move an Asset to a Different Location



- 1) Navigate to the **IA Assets Application**, located within the Assets Module.
- 2) Open the record you wish to move.
- 3) Click on the **Select Action** menu located in the toolbar.
- 4) Select **Move/Modify Assets**.

The system will display the Move/Modify Assets pop-up window.

Move/Modify Assets

To make changes to an asset's location, parent/child relationship, users and custodians, and attributes, select the appropriate tab below.

Assets Users and Custodians Groups Attributes

Assets Filter > 1 - 1 of 1 Download

Asset	Description	Parent	Location	GL Account	To Parent	To Location	To GL Account
AB342339	Generator, Emergency		AB102851			AB102855	

Select More Assets

Mass Move

Use the fields listed below to specify a new location, parent, or bin for all the assets listed above.

To Site: IE121 Apply

To Location: >> Apply To Parent: >> Apply To Bin: Apply

To GL Account: Apply

6 OK Cancel

- 5) Using the arrow next to the **To Location** field, select the new location.
- 6) Click **OK**.

System Message

7

BMXAA0067I - Asset AB342339 in site IE121 was moved successfully.

OK

- 7) The system will present you with a message confirming the asset move was completed successfully.

1.9 Disposal and Decommissioning Locations

If a location is set to be disposed within FBMS, it would be sent through the FBMS/IA-FMS interface with a status of 'DISPOSED'. As part of the interface, IA-FMS (Maximo) will automatically set the status as 'DISPOSAL' if the FBMS status is 'DISPOSED'.

Querying for Disposals

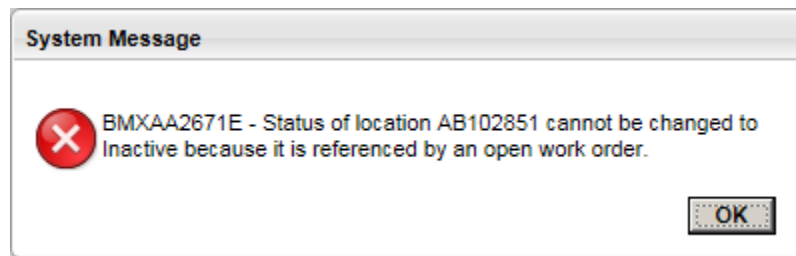
Before a location (Maximo ID) can be decommissioned, the list of these locations must first be determined. To search for records that are in a status of DISPOSAL.

The screenshot shows the IA Locations application interface. The 'Advanced Search' button is highlighted with a red box. The 'More Search Fields| Current Query:' dialog box is open, showing various search criteria. The 'Status' field is set to '=DISPOSAL' and is also highlighted with a red box. Other fields include Maximo ID, Location Parent, Location #, Structure #, Room #, Use, Maintained By, Owned By, Last CA Inspection Number, Location Type, Type, Site, API, CRV, FCI Based Condition, Funds/Cost Center, and Internal Labor Account. The 'Find' button is visible at the bottom of the dialog box.

Navigate to the **IA Locations** application.

- 1) Click on the **Advanced Search** text.
- 2) Select **DISPOSAL** from the Status field.
- 3) Click **Find**.

Note: Before a Location in DISPOSAL status can be **DECOMMISSIONED** in IA-FMS (Maximo), all of its work orders including Standing Parent work orders must be CLOSED or CANCELLED. If not the following error message will display.



Warning: Any reusable Assets associated with this Location must also be Moved or they will also become Decommissioned.

1.10 Assets - Student Exercise #1

In this exercise you will create a basic asset record. Use the following steps:

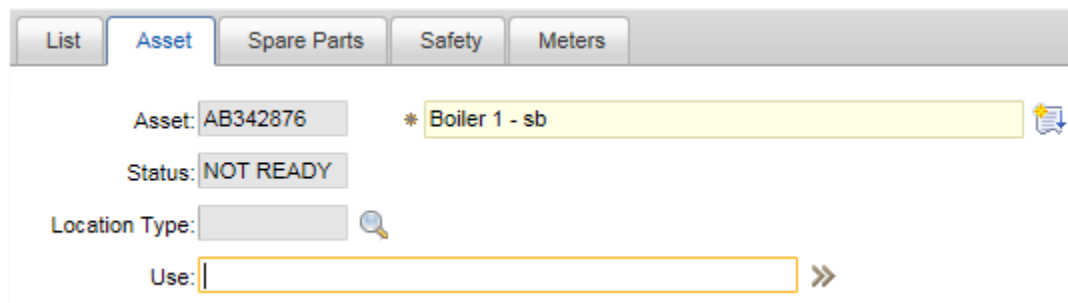
1. Navigate to the **IA Assets** application.



2. Click on the **New Asset** icon located on the Toolbar



3. Enter a **Description** for the asset as shown below. Include your initials at the end of the description. This will make the record easier to find in the future.



List Asset Spare Parts Safety Meters


Asset: AB342876 * Boiler 1 - sb

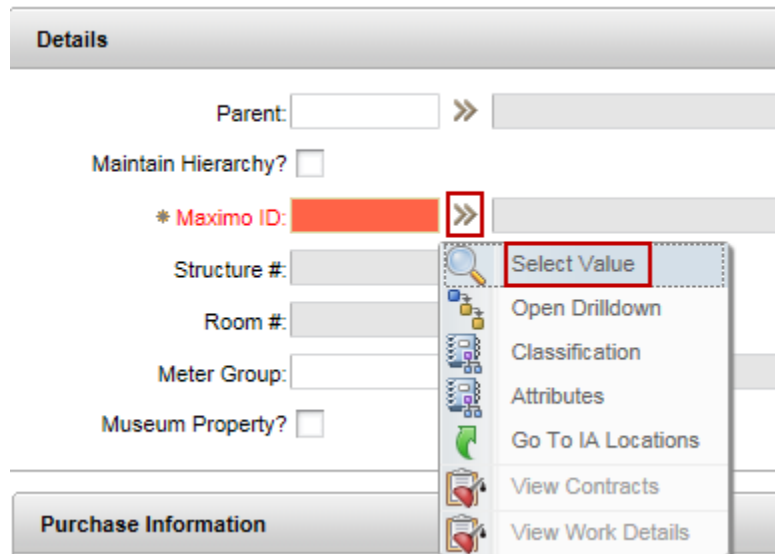
Status: NOT READY

Location Type:

Use: >>







4. Make note of the auto-assigned unique **Asset** number: _____
(Your number will differ from the one illustrated above).

5. Select the location (Maximo ID) where the asset is to be located.
 - a. Click the **Detail Menu**  next to the **Maximo ID** field to display a list of locations to choose from. Choose **Select Value** to display the location list and make your selection.




The screenshot shows the 'Details' section of a Maximo form. It includes fields for 'Parent', 'Maintain Hierarchy?' (checkbox), '* Maximo ID', 'Structure #', 'Room #', 'Meter Group', and 'Museum Property?' (checkbox). A 'Detail Menu' icon (two arrows pointing right) is located next to the 'Maximo ID' field. The menu is open, showing options: 'Select Value' (highlighted with a red box), 'Open Drilldown', 'Classification', 'Attributes', 'Go To IA Locations', 'View Contracts', and 'View Work Details'.

- b. Select **any** location for this asset by clicking on the location's **Maximo ID** number. (The list will display locations for the site to which you have access).


Select Value			
Filter >     1 - 20 of 504  Download 			
Location	Description	Type	Site
AB101284	Pump House	OPERATING	IE150
AB101285	School, Elementary, Day	OPERATING	IE150
AB101286	Garage, Bus	OPERATING	IE150
AB101287	School, Elementary, Day	OPERATING	IE150
AB101288	Storage, Non-Heated	OPERATING	IE150
AB101289	School, Other	OPERATING	IE150
AB101290	Gymnasium	OPERATING	IE150
AB107291	School, Secondary, Day	OPERATING	IE150
AB107292	Gymnasium	OPERATING	IE150

Select the correct **Type** for the asset.

- c. Click the **Select Value**  next to the **Type** field to display a list of valid types to choose from.

Site: IE121 RED ROCK DAY SCHOOL 

Location #: N32-07

Type: 

- d. Select an **Asset Type** value from the list. For this exercise, select "FACILITIES".

Select Value


Filter >     1 - 4 of 4  Download 

<u>Value</u>	<u>Description</u>
<input type="text"/>	
FACILITIES	Facilities Assets
FLEET	Fleet Assets
IT	IT Assets
PRODUCTION	Production Assets

Cancel

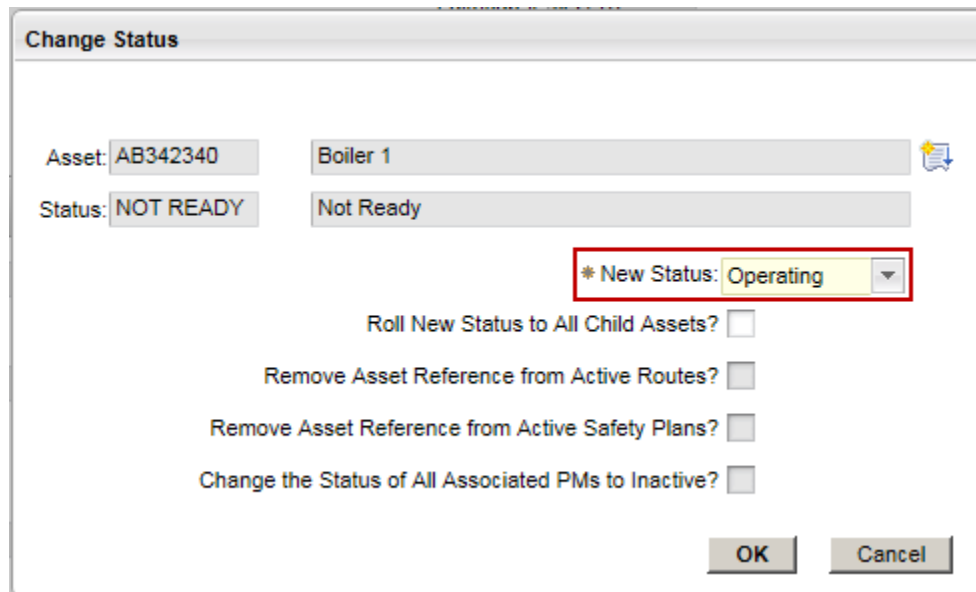
6. Save the Asset by clicking the **Save** icon  located on the Toolbar.

Select Action        

7. Change the status of the Asset to **Operating**. Click the  icon on the Toolbar to display the **Change Status** pop-up screen.



- a. Select **Operating** from the **New Status** selection list.




A screenshot of a 'Change Status' dialog box. At the top is the title 'Change Status'. Below the title, there are two rows of input fields. The first row has 'Asset: AB342340' and 'Boiler 1'. The second row has 'Status: NOT READY' and 'Not Ready'. Below these fields is a dropdown menu labeled '* New Status:' with 'Operating' selected; this dropdown is highlighted with a red box. Underneath the dropdown are four checkboxes with labels: 'Roll New Status to All Child Assets?', 'Remove Asset Reference from Active Routes?', 'Remove Asset Reference from Active Safety Plans?', and 'Change the Status of All Associated PMs to Inactive?'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

8. Click **OK**




1.11 Assets- Student Exercise #2

In this exercise you will create three Asset Records for a single location (structure). Use the following information:




First Asset

1. Navigate to the **IA Assets** application.
2. Click on the **New Asset**  icon located on the Toolbar
3. Note the auto-assigned unique asset number _____
4. Enter a description for the Asset
 - Description: *Double Hung Window (plus your initials)*
5. Select the location (Maximo ID) for the asset.
6. Note the location (Maximo ID) for the asset _____
7. Enter the following data:
 - Type: FACILITIES
8. **Save**  the Asset.
9. Change the Asset **Status**  to "OPERATING".

Second Asset

1. Navigate to the **IA Assets** application.
2. Click on the **New Asset**  icon located on the Toolbar
3. Note the auto-assigned unique asset number _____
4. Enter a description for the Asset
 - Description: *Foundation (plus your initials)*
5. Select the same location for the asset as you selected above (for the first asset).
6. Enter the following data:
 - Type: FACILITIES
7. **Save**  the Asset.
8. Change the Asset Status  to "OPERATING".

Third Asset

1. Navigate to the IA Assets application.
2. Click on the New Asset  icon located on the Toolbar
3. Note the auto-assigned unique asset number _____
4. Enter a description for the asset
 - Description: *Ejector Pump, 1/2 HP (plus your initials)*
5. Select the same location for the asset as you selected above (for the first asset).
6. Enter the following data:
 - Type: FACILITIES
7. **Save**  the Asset.
8. Change the Asset Status  to "OPERATING".

1.12 Assets- Student Exercise #3

In this exercise you will move an Asset from one location to another. For the exercise, you will be using one of the asset records you previously created in Exercise #2. Use the following information:

1. Navigate to the **IA Assets** application.



2. Find the **Pump** asset you created during Exercise #2. (*Description: Asset Exercise #2 - Ejector Pump, 1/2 HP*). From the Asset list tab, enter the following text in the **Description** filter field and press the enter key.

Note: You will be able easily identify the correct “ejector pump” by its asset number which you recorded in Exercise 2 or by the initials that were added at the end of the Description.

[List](#)
[Asset](#)
[Spare Parts](#)
[Safety](#)
[Meters](#)

Advanced Search : ▼
 Save Query : ▼
 Bookmarks

Assets
Filter >
 1 - 1 of 1

Asset	Description	Maximo ID
<input type="text" value="AB342876"/>	<input type="text" value="ejector pump"/>	<input type="text" value="AB107293"/>
AB342876	Ejector Pump, 1/2 HP (your initials)	AB107293

3. Select the Asset by clicking on the **Asset** number from the filtered list screen.

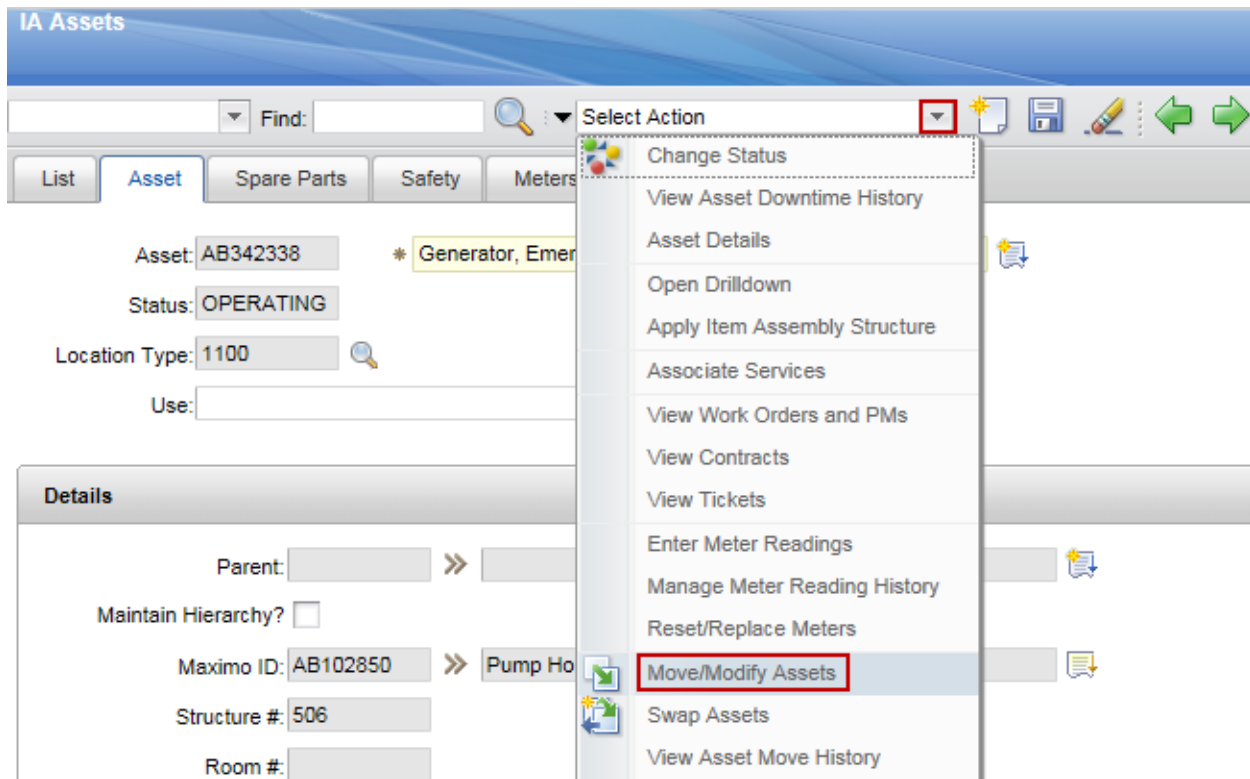
[List](#)
[Asset](#)
[Spare Parts](#)
[Safety](#)
[Meters](#)

Advanced Search : ▼
 Save Query : ▼
 Bookmarks

Assets
Filter >
 1 - 1 of 1

Asset	Description	Maximo ID
<input type="text" value="AB342876"/>	<input type="text" value="ejector pump"/>	<input type="text" value="AB107293"/>
AB342876	Ejector Pump, 1/2 HP (your initials)	AB107293

4. With the Asset record displayed, click on the **Select Action** menu located on the toolbar. Select **Move / Modify Assets** (see below)



5. The system will display the **Move / Modify Assets** pop-up screen.

Move/Modify Assets

To make changes to an asset's location, parent/child relationship, users and custodians, and attributes, select the appropriate tab below.

Assets Users and Custodians Groups Attributes

Assets Filter > 1 - 1 of 1

Asset	Description	Parent	Location	GL Account	To Parent	To Location	To GL Account
AB342341	Asset Exercise #2 - Ejector Pump, 1/2 HP		AB102850			AB102858	

Select More Assets

Mass Move


Use the fields listed below to specify a new location, parent, or bin for all the assets listed above.

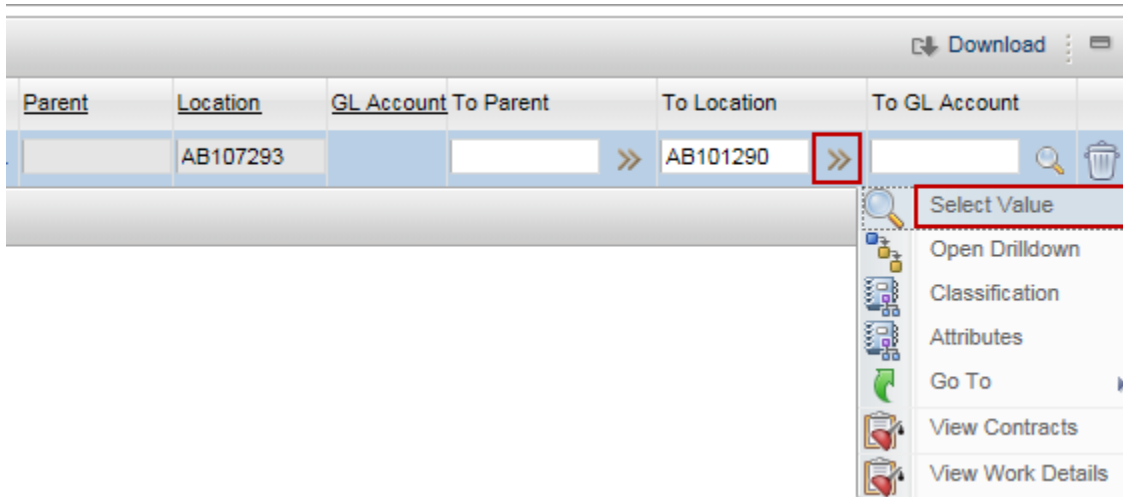
To Site: IE121 Apply

To Location: Apply To Parent: Apply To Bin: Apply

To GL Account: Apply

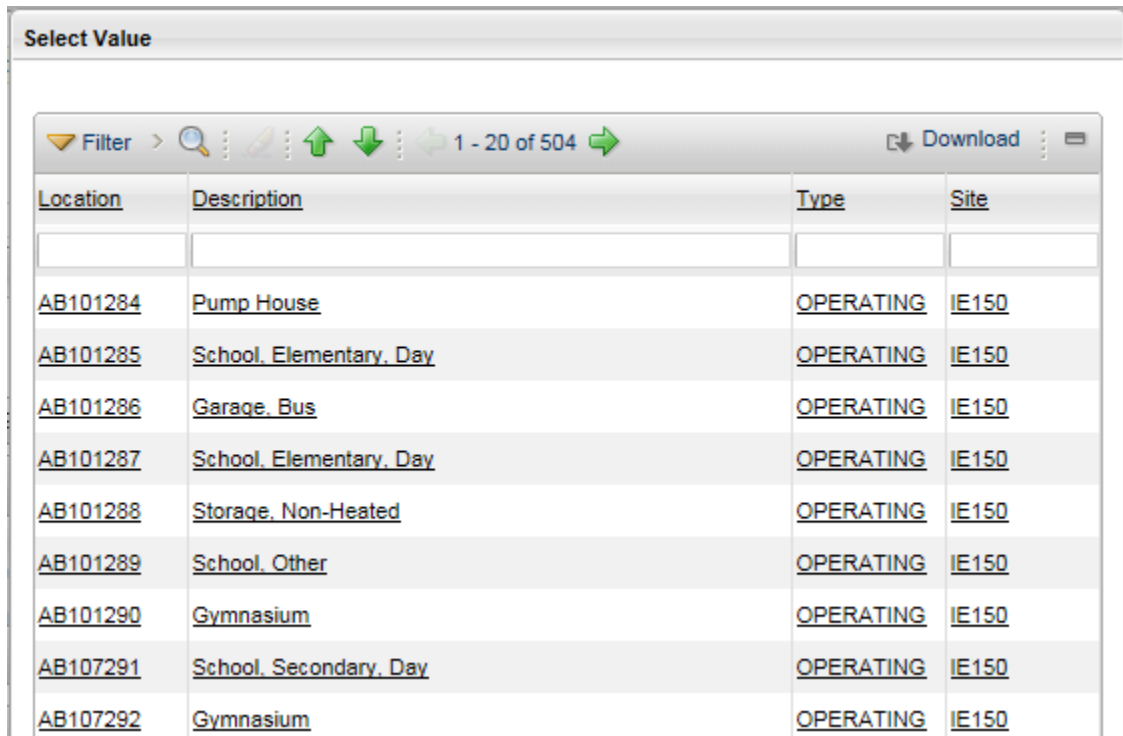
OK Cancel

6. Click the **Detail Menu** icon  next to the **To Location** field to display a list of locations from which to choose. Choose **Select Value** to display the location list of available locations to move the asset to. The system will display a default value for the current location of the asset in the **To Location** field. Select **any** Location. Your selection will change this value and designate where the asset will be moved.








Parent	Location	GL Account	To Parent	To Location	To GL Account
	AB107293			AB101290	

7. Select **any** location by clicking on the **Maximo ID** for the target location where you will be moving the asset. Select any different location.



Select Value

Filter >     1 - 20 of 504  Download

Location	Description	Type	Site
AB101284	Pump House	OPERATING	IE150
AB101285	School, Elementary, Day	OPERATING	IE150
AB101286	Garage, Bus	OPERATING	IE150
AB101287	School, Elementary, Day	OPERATING	IE150
AB101288	Storage, Non-Heated	OPERATING	IE150
AB101289	School, Other	OPERATING	IE150
AB101290	Gymnasium	OPERATING	IE150
AB107291	School, Secondary, Day	OPERATING	IE150
AB107292	Gymnasium	OPERATING	IE150

8. Make note of the location (Maximo ID) you selected. This is where the asset will be moved to:

9. After selecting the target **To Location**, click the **OK** button.

Location	GL Account	To Parent	To Location	To GL Account
AB107293			AB101290	

ibutes, select the appropriate tab below.

Download

Select More Assets

To Bin:

Apply

OK Cancel

10. The system will confirm the asset move.

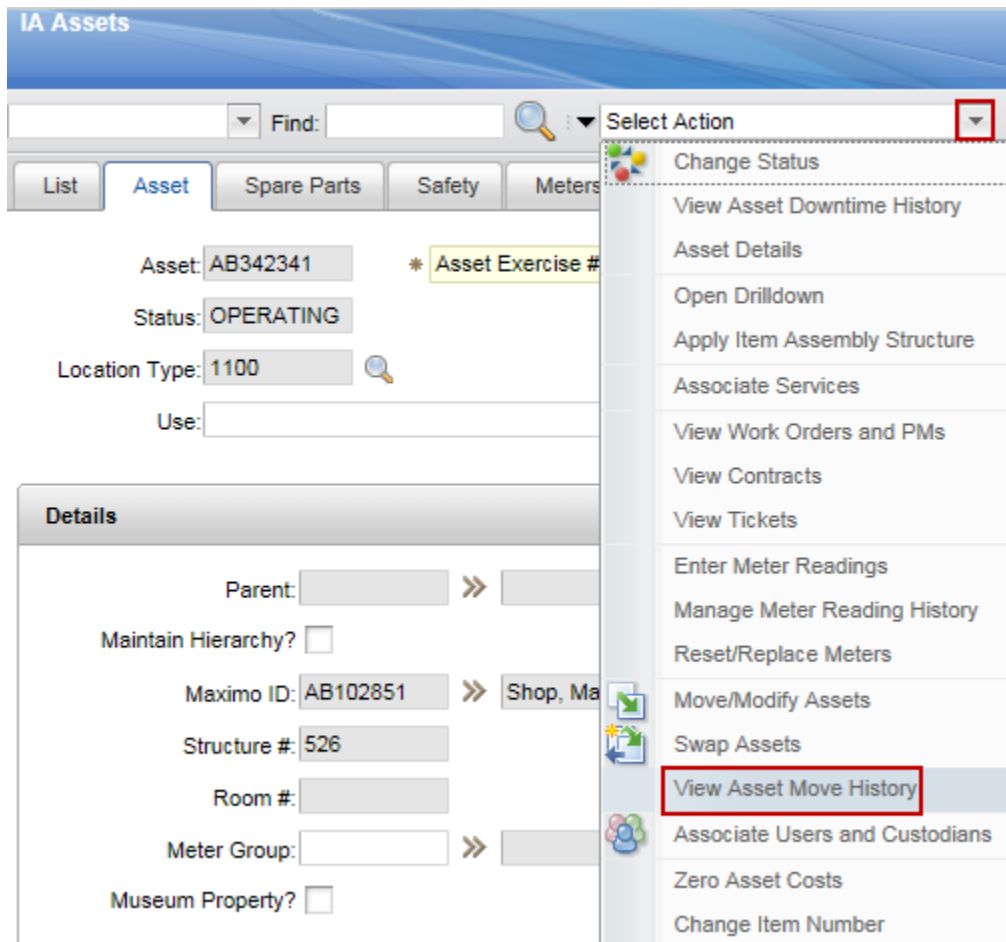
System Message

BMXAA0067I - Asset AB342341 in site IE121 was moved successfully.

OK

11. Click **OK**.

12. View the **Asset Move History** to confirm the move. Click on the **Select Action** menu located on the toolbar. Select **View Asset Move History**.



13. The system will display the asset's move history. The pop-up screen shows the location where the asset was originally installed (CREATED), and the current location.

View Asset Move History								
Filter > 1 - 2 of 2								
	Transaction Type	Moved Date	From Parent	From Location	From Site	To Parent	To Location	To Site
▶	CREATED	07/08/2016 11:05 AM			IE121		AB102850	IE121
▶	MOVED	07/08/2016 11:08 AM		AB102850	IE121		AB102851	IE121

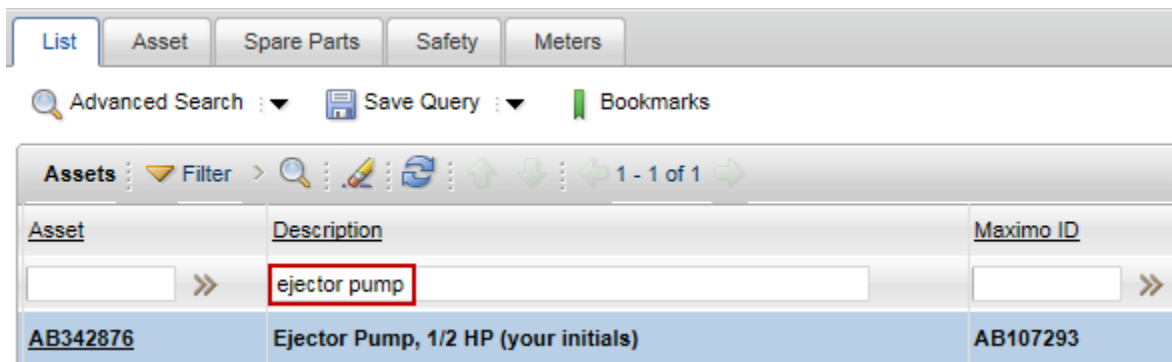
1.13 Assets- Student Exercise #4

In this exercise you will copy / duplicate an Asset record. For the exercise, you will be using one of the Asset Records you previously created in Exercise #2. Use the following information:

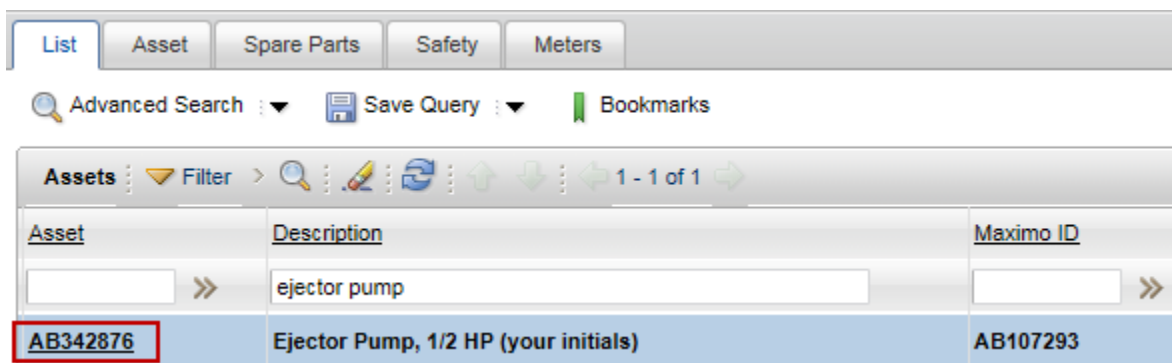
1. Navigate to the **IA Assets** application.



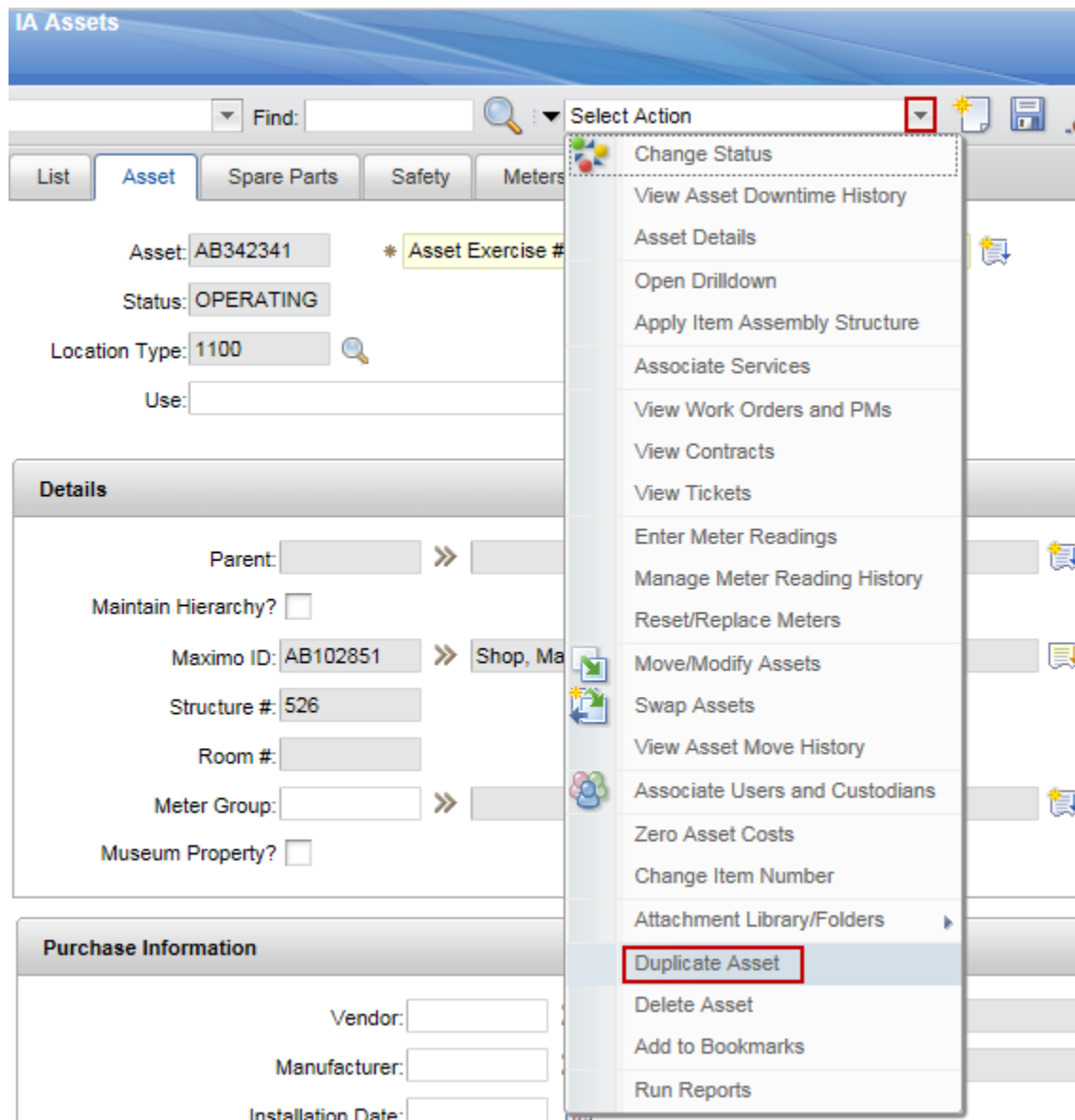
2. Find the **Pump** asset you created during Exercise #2. (*Description: Ejector Pump, 1/2 HP*). From the asset List tab, enter the following text in the **Description** filter field and press the enter key.



3. Select the Asset by clicking on the **Asset** number from the filtered List tab.
Note: Your asset number will be different from the one shown below.



4. With the asset record displayed, click on the **Select Action** menu located on the toolbar. Select **Duplicate Asset** (see below)



5. The system will duplicate the current asset and will display the newly copied asset on screen. In the status message area near the top of the screen, the system will confirm the asset duplication with the following message.

BMXAA4131E - Record has been duplicated.

6. Change the asset description on the newly copied asset record. Change the description to:
 - Description: *Copy of Ejector Pump, 1/2 HP (plus your initials)*

List Asset Spare Parts Safety Meters

Asset: AB342877 * Copy of Ejector Pump, 1/2 HP (your initials)

Status: OPERATING

Location Type: 1100

Use: >>

NOTE: The asset will be created in an Operating Status.

7. The newly copied asset will need to be assigned to a location. By default, the system does not copy the asset's location to the new record.
8. Click the **Detail Menu** icon >> next to the **Maximo ID** field to display a list of locations to choose from. Choose **Select Value** to display the location list of available locations for the asset.

Details

Parent: >>

Maintain Hierarchy? ☐

* Maximo ID: >>

Structure #:

Room #:

Meter Group:

Museum Property? ☐

Purchase Information


- Select Value
- Open Drilldown
- Classification
- Attributes
- Go To IA Locations
- View Contracts
- View Work Details

9. Select **any** location by clicking on the **Maximo ID** for the target location where the copied asset will reside. Either select the same location or a different location.

Select Value

Filter > 1 - 20 of 504 Download

Location	Description	Type	Site
AB101284	Pump House	OPERATING	IE150
AB101285	School, Elementary, Day	OPERATING	IE150
AB101286	Garage, Bus	OPERATING	IE150
AB101287	School, Elementary, Day	OPERATING	IE150
AB101288	Storage, Non-Heated	OPERATING	IE150
AB101289	School, Other	OPERATING	IE150
AB101290	Gymnasium	OPERATING	IE150
AB107291	School, Secondary, Day	OPERATING	IE150
AB107292	Gymnasium	OPERATING	IE150

10. Save the Asset by clicking the **Save** icon  on the toolbar.



1.14 Locations- Student Exercise #1

In this exercise you will create a basic child location record. The room location will then be associated with an existing building location. Use the following steps:

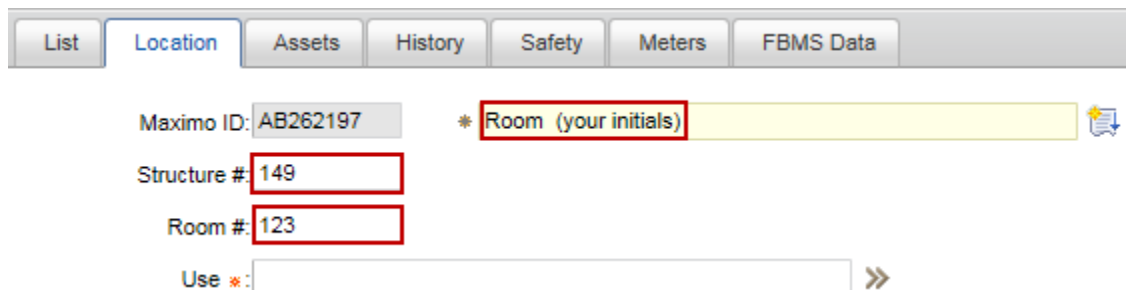
1. Navigate to the **IA Locations** application.



2. Click on the **New Location** icon located on the Toolbar 



3. Enter a **Description** of 'Room' for the location as illustrated below. For added transparency, enter your initials at the end of the description.



List Location Assets History Safety Meters FBMS Data


Maximo ID: AB262197 * Room (your initials)

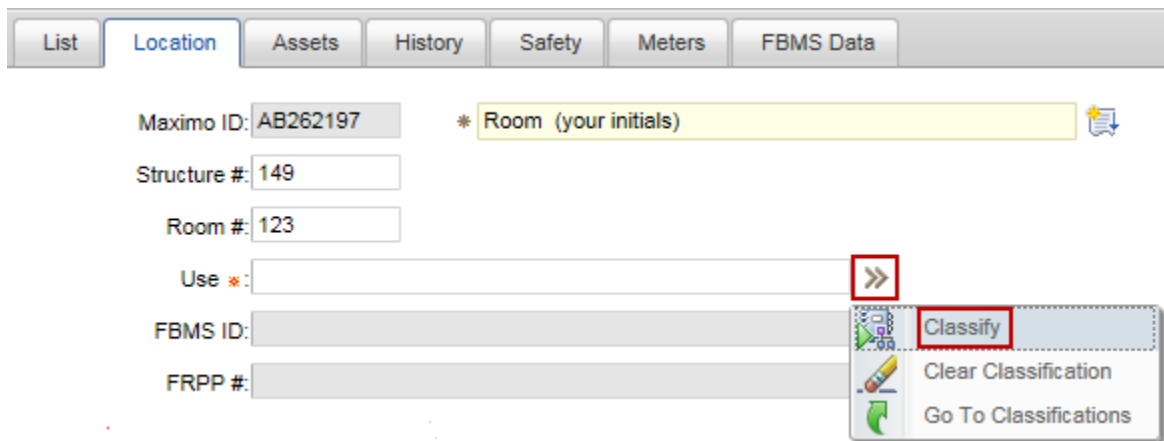
Structure #: 149


Room #: 123

Use *: >>

4. Make note of the auto-assigned unique **Maximo ID**: _____
(Your number will differ from the one illustrated above).
5. Enter the **Structure #** for the room location. **For this exercise use one of the following Structure #'s: 143, 144, 145, 146, 147, 148, or 149.**
6. Enter the **Room #** (optional).


7. Click the **Detail Menu** icon  next to the **Use** field. Choose **Classify** to display classifications to properly categorize the location.





Maximo ID: AB262197 * Room (your initials) 

Structure #: 149

Room #: 123

Use *: 


FBMS ID: 

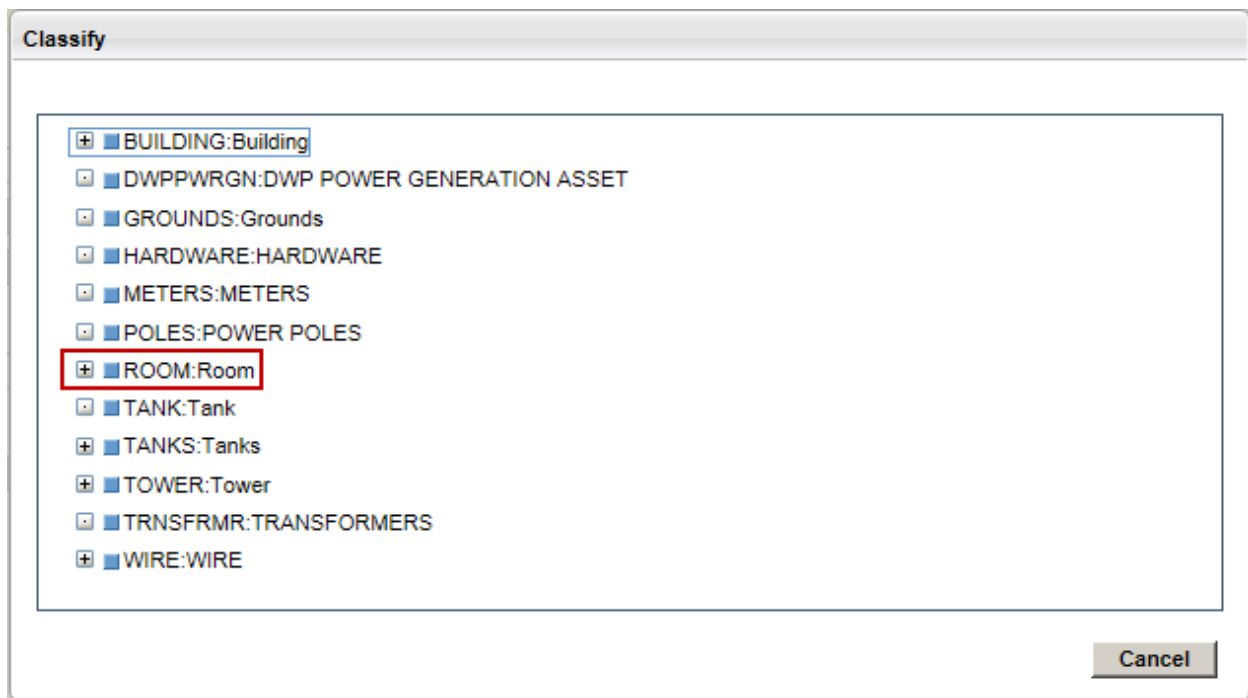
FRPP #: 

Classify













Clear Classification

Go To Classifications


- a. Select the **Room** classification by scrolling down the classification list. Click on the  icon next to ROOM to select the ROOM classification. The selection list will automatically close after selecting the classification value.



Classify

-  BUILDING:Building
-  DWPPWRGN:DWP POWER GENERATION ASSET
-  GROUNDS:Grounds
-  HARDWARE:HARDWARE
-  METERS:METERS
-  POLES:POWER POLES
-  **ROOM:Room**
-  TANK:Tank
-  TANKS:Tanks
-  TOWER:Tower
-  TRNSFRMR:TRANSFORMERS
-  WIRE:WIRE

Cancel

8. Select the correct **Location Type** for the location. In this example, you will select **Room**. This may seem redundant, however, you can select a different location Use (above) if the room has a specific purpose.
- a. Click the **Select Value** icon  next to the **Location Type** field to display a list of values from which to choose.

List Location Assets History Safety Meters FBMS Data

Maximo ID: AB262197 * Room (your initials)

Structure #: 149

Room #: 123

Use *: ROOM >>

FBMS ID:

FRPP #:

* Location Type: [Redacted]

Maintained By:

* Owned By: [Redacted]

Tribal Reference ID:

- b. Select a **Location Type** value from the list. For this exercise, select "Room".

Select Value


Filter > 1 - 7 of 7 Download

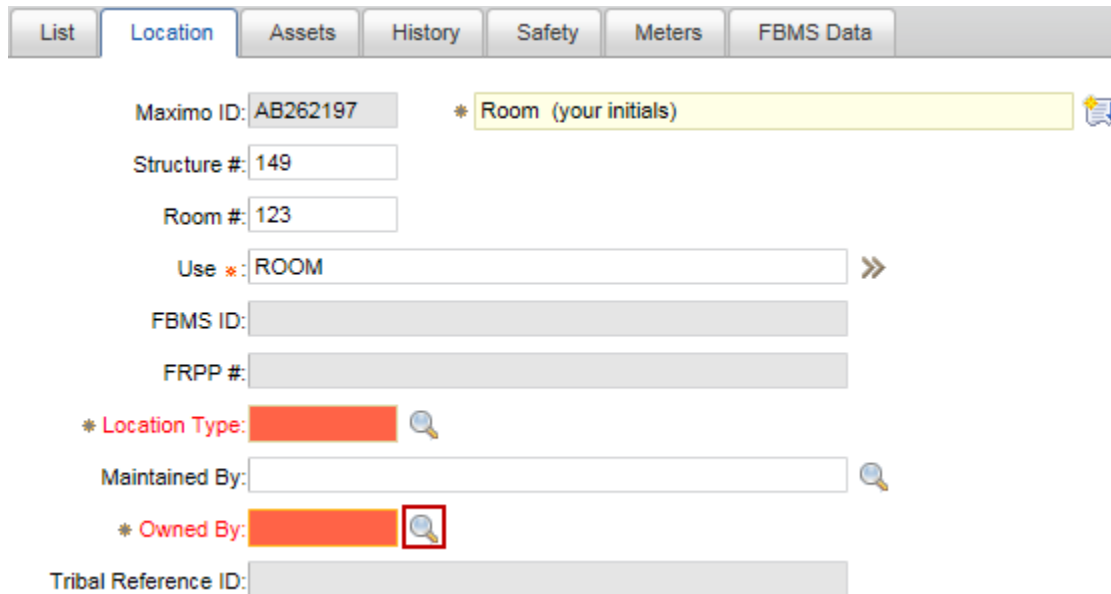
Value	Description
0000	Sub top Level
0001	Top Level
1100	Building
1150	Room
1200	Grounds
1300	Tower
1400	Tank

Cancel


NOTE: After selecting Room (1150) as the Location Type, Maximo will automatically insert an additional (Main) tab called *Room Detail*. This additional tab is used to capture specific information about a room. Things like: Funded Square Footage, is the room Maintained? and is the room Handicap accessible?

List Location **Room Detail** Assets History Safety Meters FBMS Data

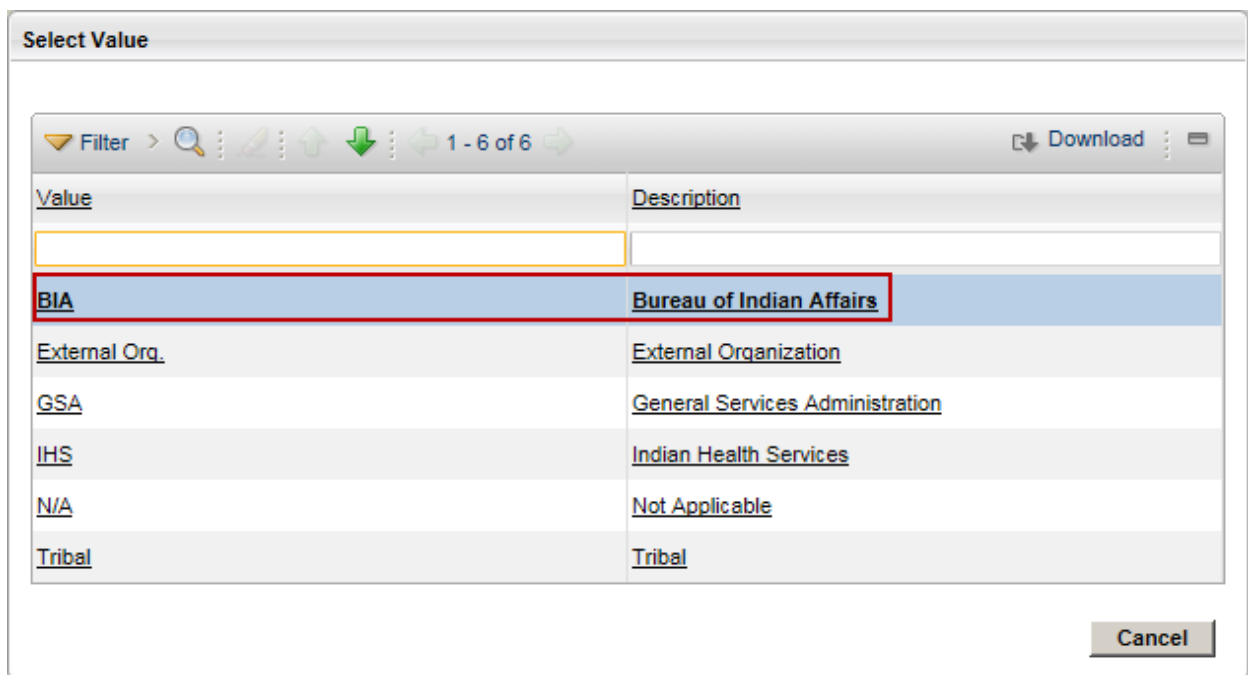
9. Select the correct **Owned By** value for the location. In this example, you will select **BIA**.
 - a. Click the **Select Value** icon  next to the **Owned By** field to display a list of valid types to choose from.



Location form fields:

- Maximo ID: AB262197
- Structure #: 149
- Room #: 123
- Use *: ROOM
- FBMS ID:
- FRPP #:
- * Location Type:
- Maintained By:
- * Owned By: 
- Tribal Reference ID:

- b. Select **BIA** from the **Owned By** value list.



Select Value dialog box:

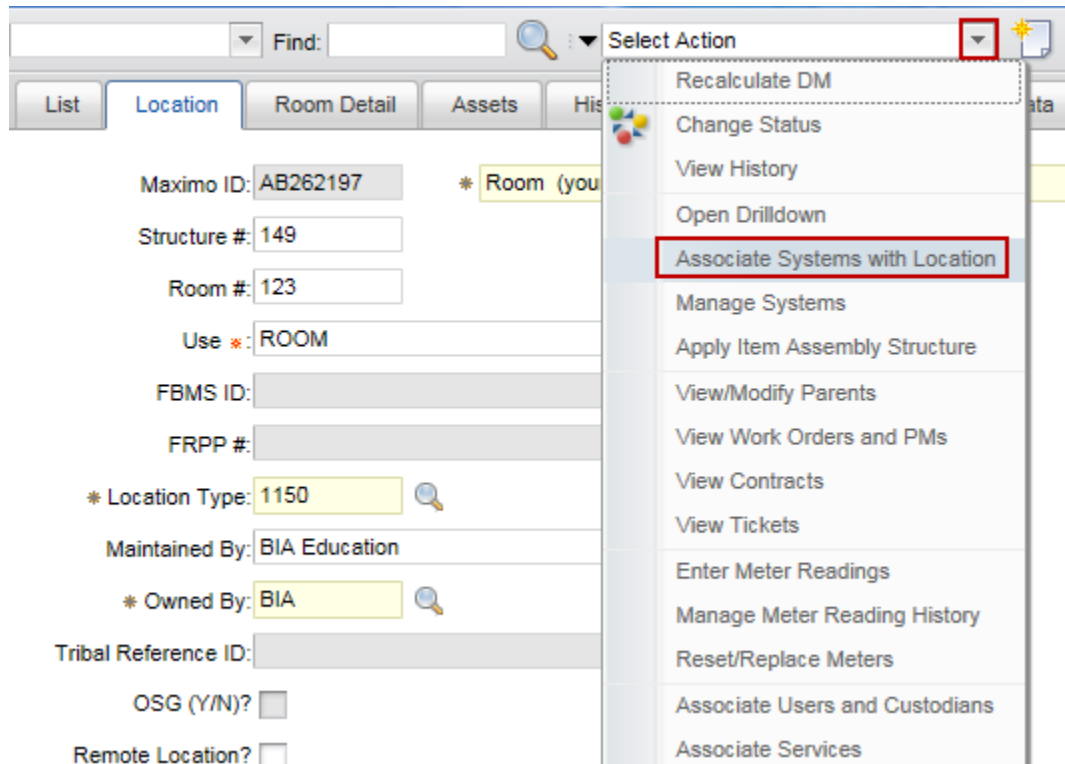
Value	Description
BIA	Bureau of Indian Affairs
External Org.	External Organization
GSA	General Services Administration
IHS	Indian Health Services
N/A	Not Applicable
Tribal	Tribal

Buttons: Filter, Download, Cancel

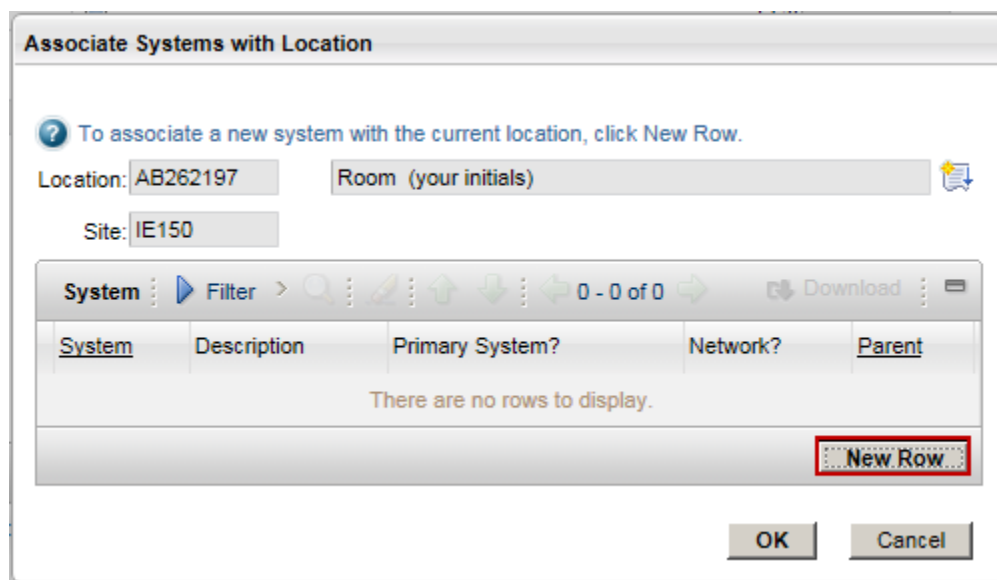
10. Save the Room location record by clicking the **Save** icon  located on the Toolbar.



11. From the **Select Action** menu, select **Associate Systems with Location**.



12. The system will display the **Associate Systems with Location** dialog screen.
a. Click on the **New Row** button.



Associate Systems with Location

To associate a new system with a location, click the **Select Value** icon next to the **System** field.


Location: AB262197
Site: IE150


System Filter >

System	Description	Network?
PRIMARY	IE150 PRIMARY SYSTEM	<input type="checkbox"/>

Cancel

Details


* System: 

Parent: >> 

Primary System? ☐
Network? ☐

New Row

OK Cancel

- b. Click the **Select Value** icon  next to the **System** field to display the System to choose. Select a **Primary** from the value from the list.

13. Click the **Detail Menu** icon  next to the **Parent** field to display a list of parent locations to associate with the child (Room) location.

Associate Systems with Location

To associate a new system with the current location, click New Row.


Location: AB261083 Room 123

Site: IE121

System	Description	Primary System?	Network?	Parent
PRIMARY	IE121 PRIMARY SYSTEM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Details

* System: PRIMARY IE121 PRIMARY SYSTEM

Parent: 

Primary System? ☒

Network? ☐

Select Value

Open Drilldown

Classification

Attributes

View Contracts

View Work Details

New Row

OK Cancel

- a. Choose **Select Value** to display the list of use locations and make your selection.

List Location Room Detail Assets History Safety Meters FBMS Data

Maximo ID: AB262199

Structure #: 149

Room #: 123

Use *: ROOM

FBMS ID:

FRPP #:

* Location Type: 1150

Maintained By: General Administ

* Owned By: BIA

Select Value

Maximo ID	Description	Location Type	Site	Structure #
				149
AB107714	Quarters, Single-Family	1100	IA004	149
AB199645	Quarters, Other	1150	IA004	149

Cancel

- b. Search for the Parent location by using the **Structure #** that was used for the Room.
- c. Select the **Parent Location** using the Maximo ID.

14. The **Associate Systems with Location** dialog screen will now have the **System** and **Parent** location values selected.

Associate Systems with Location

To associate a new system with the current location, click New Row.

Location: AB262199 Room (Your Initials)

Site: IA004

System	Description	Primary System?	Network?	Parent
PRIMARY	IA004 PRIMARY SYSTEM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AB107714

Details

* System: PRIMARY IA004 PRIMARY SYSTEM

Parent: AB107714 Quarters, Single-Family

Primary System? ☒

Network? ☐

New Row

OK Cancel


15. Click **OK**.

16. The Room Record now displays the **System** information and the **Parent** relationship.


17. Change the Maximo ID (i.e. Location) Status to Operating by selecting the Change Status icon




Change Status

Location: AB262199 Room (Your Initials) 

Status: NOT READY Not Ready

* New Status: Operating 

Status Date: 09/23/2016 12:55 PM 

Memo:

Roll New Status down to All Child Locations in All Non-Network Systems? ☐

Roll New Status down to All Assets in All Changed Locations? ☐

Remove All References to This Location from All Job Plans? ☐








Remove All References to This Location from All Routes? ☐










Remove All References to This Location from All Safety Plans? ☐

Change the Status of All Associated PMs to Inactive? ☐

OK Cancel

- Select the status of **Operating**.
- Click **OK**.

Systems  Filter >      1 - 1 of 1 		
System	Description	
PRIMARY	IA004 PRIMARY SYSTEM	

Parent of AB262199 in the PRIMARY System  Filter >      1 - 1 of 1 		
Parent	Description	
 AB107714 	Quarters, Single-Family	


18. Click on the **Room Details** tab to display the additional room-related fields.



19. Enter the appropriate values for the following fields (If necessary. They are not required):

- a. Room Number
- b. Funded SF
- c. Handicap Accessible
- d. Maintained?

The screenshot shows the 'Room Detail' tab selected in the interface. Below the tab bar, the 'Room Detail' section contains four input fields: 'Room #:' with the value '123', 'Funded (SF):', 'Handicapped?' with an unchecked checkbox, and 'Maintained?' with an unchecked checkbox.



20. Save the Room location record by clicking the **Save** icon  located on the Toolbar.

1.15 Locations- Student Exercise #2

In this exercise you will add an additional **Child Location** record. The child location will be a Room record (similar to the record created in Location Exercise #1). Use the following steps:

Before beginning this exercise: Find a Maximo location (aka Structure) that you will use for each of the room records you will be creating. Make note of the Structure Number here

_____.

1. Navigate to the **IA Locations** application.
2. Click on the **New Location** icon located on the Toolbar .
3. Enter the **Description** - *Room 100, East Hall (Your initials)*.
4. Make note of the auto-assigned unique Maximo ID: _____ (your number will differ from the one illustrated above).
5. Use the structure you selected prior to beginning this exercise. Enter the **Structure #** for the Room location: _____.
6. Classify the new child location as a Room by selecting the classification in the **Use** field.
7. Select the correct **Location Type** for the location. In this example, you will select "**Room**".
8. Accept the default **Maintained By** field value or change it to an appropriate value.
9. Select the correct **Owned By** value for the location. In this example, you will select **BIA**.
10. Select the correct **Type** value for the location. In this example, you will select **OPERATING**.
11. Save the Room location record by clicking the **Save** icon  located on the Toolbar.

12. From the **Select Action** menu, select **Associate Systems with Location**.

The screenshot shows the 'Select Action' menu with the following options: Recalculate DM, Change Status, View History, Open Drilldown, **Associate Systems with Location** (highlighted), View/Modify Parents, View Work Orders and PMs, Enter Meter Readings, Manage Meter Reading History, Reset/Replace Meters, Associate Users and Custodians, Duplicate Location, Add to Bookmarks, and Run Reports. The background interface includes a 'Find' search bar and tabs for List, Location, Room Detail, Assets, and History. The 'Location' tab is active, displaying fields for Maximo ID (AB261083), Structure # (79), Room #, Use (ROOM), FBMS ID, FRPP #, Location Type (1150), Maintained By (BIA Education), Owned By (BIA), Tribal Reference ID, OSG (Y/N), and Remote Location.


13. The system will display the **Associate Systems with Location** dialog screen.

The 'Associate Systems with Location' dialog screen displays the following information: A message box stating 'To associate a new system with the current location, click New Row.' Input fields for Location (AB262197), Room (your initials), and Site (IE150). A table with columns: System, Description, Primary System?, Network?, and Parent. The table is empty, with the message 'There are no rows to display.' A 'New Row' button is highlighted with a red rectangle. At the bottom are 'OK' and 'Cancel' buttons.

14. Click on the **New Row** button.


The screenshot shows a software interface for associating systems with a location. A 'Select Value' pop-up window is open, displaying a table with one row of data. The table has three columns: 'System', 'Description', and 'Network?'. The 'System' column contains the word 'PRIMARY' in a red box. The 'Description' column contains 'IE150 PRIMARY SYSTEM'. The 'Network?' column contains an unchecked checkbox. The pop-up window has a 'Cancel' button at the bottom right. In the background, the 'Associate Systems with Location' dialog box is visible, showing fields for 'Location' (AB262197) and 'Site' (IE150). It also has a 'System' field with a search icon next to it. Below the 'System' field is a 'Details' section with fields for 'Parent', 'Primary System?' (unchecked), and 'Network?' (unchecked). At the bottom of the dialog box are 'OK' and 'Cancel' buttons.


System	Description	Network?
PRIMARY	IE150 PRIMARY SYSTEM	<input type="checkbox"/>

- Click the **Select Value** icon  next to the **System** field to display the System to choose.
- Select a **Primary** from the value from the list.








15. Click the **Detail Menu** icon  next to the **Parent** field to display a list of parent locations to associate the child (Room) location with.


Associate Systems with Location

 To associate a new system with the current location, click New Row.



Location: AB261083 Room 123 


Site: IE121

System Filter      1 - 1 of 1  Download 

System	Description	Primary System?	Network?	Parent	
PRIMARY	IE121 PRIMARY SYSTEM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		


Details

* System: PRIMARY  IE121 PRIMARY SYSTEM 

Parent: 

Primary System? ☒

Network? ☐

 **Select Value**








- Open Drilldown
- Classification
- Attributes
- View Contracts
- View Work Details

New Row

OK **Cancel**

- b. Choose **Select Value** to display the list of use locations and make your selection. Enter the **Structure #** you choose for this location and previously entered in the **Structure #** field.

Select Value

Filter      1 - 2 of 2  Download 

Maximo ID	Description	Location Type	Site	Structure #
				149
AB107714	Quarters, Single-Family	1100	IA004	149
AB199645	Quarters, Other	1150	IA004	149

Cancel

Location Room Detail Assets History Safety Meters FBMS Data

Maximo ID: AB262199

Structure #: 149

Room #: 123

Use *: ROOM

FBMS ID:

FRPP #:

* Location Type: 1150

Maintained By: General Administ

* Owned By: BIA

- c. Click **OK** to close the **Associate Systems with Location** dialog screen.
- d. Click on the **Room Details** tab to display the additional data elements to populate for each room record.

List	Location	Room Detail	Assets	History	Safety	Meters	FBMS Data
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- e. Enter the appropriate values for (you may enter any values of your choosing):
- Room Number
 - Funded SF
 - Handicap Accessible
 - Maintained?

List	Location	Room Detail	Assets	History	Safety	Meters	FBMS Data
Room Detail							
Room #: <input type="text"/>							
Funded (SF): <input type="text"/>							
Handicapped? <input type="checkbox"/>							
Maintained? <input type="checkbox"/>							

- f. Save the Room location record by clicking the **Save** icon  located on the Toolbar.

16. Change the Maximo ID (i.e. Location) Status to Operating by selecting the Change Status icon



Change Status	
Location: AB262199	Room (Your Initials) 
Status: NOT READY	Not Ready
* New Status: Operating 	
Status Date: 09/23/2016 12:55 PM 	
Memo: <input type="text"/>	
Roll New Status down to All Child Locations in All Non-Network Systems? <input type="checkbox"/>	
Roll New Status down to All Assets in All Changed Locations? <input type="checkbox"/>	
Remove All References to This Location from All Job Plans? <input type="checkbox"/>	
Remove All References to This Location from All Routes? <input type="checkbox"/>	
Remove All References to This Location from All Safety Plans? <input type="checkbox"/>	
Change the Status of All Associated PMs to Inactive? <input type="checkbox"/>	
OK	Cancel

- Select the status of **Operating**.
- Click **OK**.